



SFA software evaluation template

Find your SFA match with this easy-to-use template.



How to use this template

Investing in the right SFA solution will help increase your revenue, cut your operating costs and boost IT efficiency, but with so many options available to you, what selection criteria should you use to make the right decision for you and your company?

Knowing that not all SFA solutions are created equal, this template is designed to help you select the right SFA for your business.

To use this template:

Step 1:
Select 2-4 SFA vendors that you want to evaluate:

	CRM vendor name
1	Zendesk Sell, https://zendesk.co.uk/sell
2	
3	
4	

Step 2:
Read each chapter and provide a score for each vendor based on the descriptions below:

Score	Description
4	Goes above and beyond our requirements
3	Meets our requirements
2	May not meet our requirements
1	Does not meet our requirements
0	Does not apply

Step 3:

Fill in the score card below to receive a total score for each SFA vendor. Consider the vendors with the highest scores.

Vendor	1	2	3	4
Annual cost				
Implementation				
Mobility				
Integration				
Metrics/Insights				
Adoption				
Automation				
Scalability				
Ability to customise				
Data access				
Customer support				
Total				

02

What is the annual cost of the SFA?

All right, now that we've established that you do, in fact, have good reason to invest in an SFA system, we're cutting to the chase. While cost shouldn't be the only consideration when you're shopping for an SFA system, it's important to know whether you can actually afford the SFA services that you're evaluating.

SaaS SFA systems are ideal because they generally don't require a development fee up front and allow you to pay on a monthly basis so that you can monitor your cash flow.

SaaS translates to *software as a service*. SaaS allows subscribers to access software applications without investing in servers or paying licensing fees. Everything is included in the subscription fee, including software updates and upgrades. Using a SaaS service makes administration easier, provides automatic updates and patch management, ensures compatibility, enhances collaboration and provides access to users from any device capable of accessing the Internet.

So this is how to calculate your total annual cost:

**Number of users x
Cost per month = Annual cost**

First you need to work out how many people in your company will be using the SFA system, then visit the website of the company you're evaluating to find their subscription fee per month – or call the company directly.



Score card

Write down the annual cost for each SFA vendor you're evaluating so that you can reference cost projections at the end. Also, give each vendor a score based on your budget. A score legend for ratings 0-4 can be found on page 2.

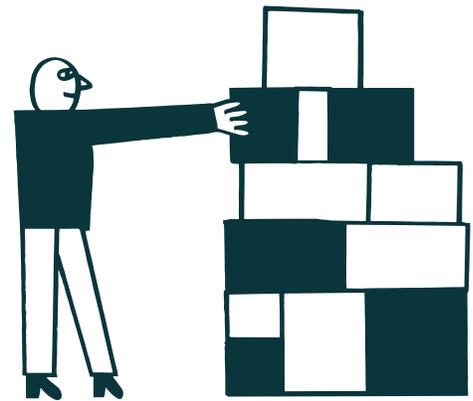
Vendor	Annual cost	Affordability score (0-4)
1.		
2.		
3.		
4.		
5.		

03

How long does the SFA take to implement?

How soon do you want or need to have your SFA up and running? Some SFA systems take a lot longer to implement than others. What good is an SFA system that you have to wait nearly a year to use? Make sure that you ask your SFA vendor how long they expect implementation to take. Don't forget to account for your own office politics, busy seasons and other events that may get in the way of timely implementation and adoption. Remember, your job isn't over when the SFA system is working, it's over when your team is actually using it.

Geoffrey James, a popular sales writer at Inc.com, shared [12 rules for successful SFA implementation](#). He offers some great tips for ensuring that your SFA implementation is successful.



Does it cost anything extra to implement?

Some SFA systems cost extra to implement, while some are easy to set up and don't require any extra implementation costs. This kind of implementation is frictionless and generally preferred. Most vendors don't offer implementation services at all and will usually refer new customers to one or more third-party implementation specialists. For companies of all sizes, but especially for small businesses and start-ups, avoid expensive SFA implementation. You can find excellent solutions that are free and or cheap to implement.

Score card

Write down the date by which you want to have your SFA fully implemented – consider implementation costs and possible roadblocks.

Vendor	Implementation score (0-4)
1.	
2.	
3.	
4.	

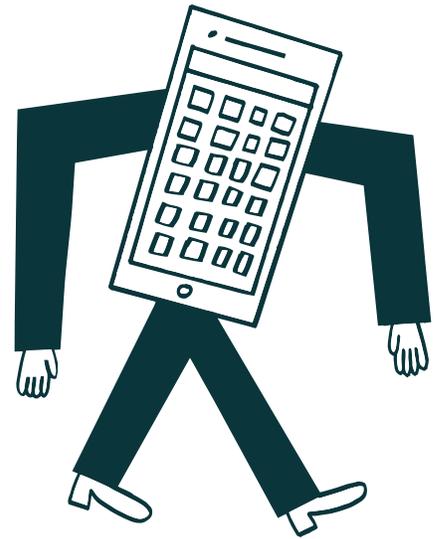
04

How important is mobility to your team?

An SFA system that works when you're sitting at your desk won't necessarily work anywhere else, such as in the field or on a plane. **Mobility is a key driver for SFA selection** so that you can make sure the experience is seamless from desktop to mobile.

When shopping for an SFA system, look for the solution that meets your team's requirements, no matter where they are. Look for a system that is easy to access on a plane, from the office, in the field, or even offline. An SFA system that is accessible in the situation relevant to a rep's work makes all the difference to user adoption.

- Does the SFA offer native mobile applications for iOS, Android and Windows?
- Is the experience between desktop and mobile seamless?
- Does the SFA automatically sync ensuring that information is up to date at all times?
- Does the SFA have offline functionality?



Score card

Evaluate the importance of mobility to your business against each SFA vendor below.

Vendor	Mobility score (0-4)
1.	
2.	
3.	
4.	

05

Does it integrate with the tools that you already use?

SFA isn't the only software that your company uses. Select an SFA system that integrates with the tools your company already uses, making it a flexible partner for all of your responsibilities. Here are some key considerations:

1. What email marketing tools does the SFA integrate with?
2. Does it offer social media integration?
3. What about document storage, such as Dropbox and Google Drive?
4. Can you attach or create invoices, proposals and sales quotes?
5. What are the key tools or programs that you need the SFA to work with?

It's important to know which integration is non-negotiable for your business. Make sure that the SFA you choose is able to connect with your tool of choice, or that it at least offers a comparable substitute.



Score card

Based on the integration that your team needs, rate the SFA vendors based on their integration options, as well as ease of integration.

Vendor	Integration score (0-4)
1.	
2.	
3.	
4.	

06

Does it provide the reports and insights that Management needs?

The data that you can glean from an SFA system is only as good as the data entered. If only half of your team is using your SFA, how good is your data? Think about what metrics you as the manager need to see – and make sure that the SFA you choose will readily provide you with these insights. Some important reports to look out for include:

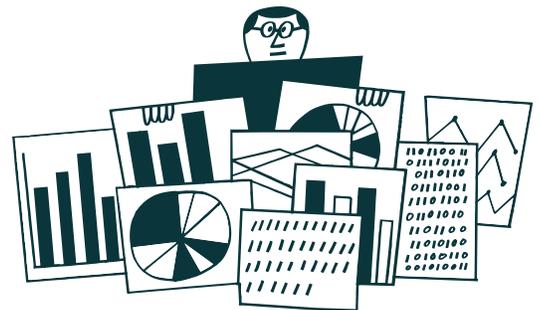
Sales funnel analysis – The sales funnel analysis report tells you where your team stands at all points in your pipeline and what your business has to lose or gain.

Incoming deals volume report – This report breaks down the number of deals registered over a period of time and percentage of the total deal count.

Sales forecasting – The sales forecasting report will tell you the total value of all deals in the pipeline and how much of that amount your business can realistically expect to bring in.

Sales revenue goals – Set and monitor individual and team revenue goals over a set time period.

Won deals – This report tells you the number of deals won, by team member, over any resolution period that you choose.



Score card

After you think about the insights you need to see from your SFA, provide a score for each SFA vendor based on their out-of-the-box reporting options.

Vendor	Metrics score (0-4)
1.	
2.	
3.	
4.	

07

Will your team actually use it?

'100% adoption or nothing'

SaaS-based SFA sales will grow to \$6.3B by 2015. With so much money being invested in SFA, it's time to address an alarming concern that could hinder your SFA strategy – a low adoption rate. Look for an SFA solution that promotes user adoption. Find an SFA partner who will minimise friction so that your team will actually use it.

Start by evaluating these three factors to gauge adoption:

Mobility

How many salespeople do you know who only work when they're at the office using their desktop computer? When shopping for an SFA system, look for the solution that meets your team's requirements, no matter where they are. An SFA system that is accessible in the situations relevant to someone's work will make all the difference to user adoption.

Zero input

While the data in your SFA system is valuable, it's not so valuable that entering the data should be more important than the selling that creates the data. As much as possible, automate tasks like call logging, email syncing and tasks. Don't turn your top salespeople into typists.

U/X

No one wants to work with a confusing SFA system with too many required fields. SFA systems are intended to produce profits. Not by virtue of their very existence, but because they make the sales cycle smooth, and they track the tasks and data relevant to closing deals. Look for the SFA system with a great UX that automates tasks when possible and pushes reminders to your mobile phone.

If you're looking for more tips to help achieve 100% adoption, [this is a good place to start](#).

Score card

Provide each SFA vendor with a score based on which one best promotes user adoption.

Vendor	Adoption score (0-4)
1.	
2.	
3.	
4.	

08

How well does it automate for you?

Continuing on the theme from Chapter 7, make sure that adoption is not a problem with your SFA. One way to mitigate the adoption risk, is to make sure that the SFA system you choose is able to automate certain tasks, reducing redundancy and helping your team to actually use it.

Call logging

It's a huge time waster to take notes on a phone call, only to have to then type them into your SFA system later. Look for an SFA system that allows you to call your contacts, leads and deals directly from the web or mobile application. Some SFA systems allow you to set up a dedicated line for each user so that customer calls can be taken directly in the SFA. What about call recording? Laws vary depending where you are, but some SFA systems have built-in recording functionality so that you can refer back to important conversations.

Task reminders

You're busy and you need help with staying on top of everything. That's why you're investing in an SFA system in the first place, aren't you? Find an SFA system that allows you to collaborate with your team by assigning tasks and setting due dates for these tasks.

Email automation

You're probably already emailing on an external platform, such as Outlook or Gmail. Look for an SFA system that offers complete email integration so that you can save time by automatically connecting all relevant emails to contacts, leads and deals.

Score card

Score potential SFA vendors on how well they automate tasks.

Vendor	Adoption score (0-4)
1.	
2.	
3.	
4.	

09

Will it grow with you?

If you're in business to make a profit, you should be thinking about how an SFA solution can scale with you. You don't want to have to go through this whole process again in a year's time, do you?

Businesses of all sizes have customers to manage, sales to track and teams to coordinate. You need an SFA solution that is simple to implement and use, yet intelligent and powerful enough to benefit your bottom line and grow with you.

Here are some things to consider:

Permissions: Does the SFA offer state-of-the-art user permissions and team management? If your team is large – or very structured – you're going to want to assign different permission sets to different users. For example, your reps want to focus on the customer data most relevant to their business (and commission payment), whereas managers may need to see data for all the members of their team. Look for an SFA system that allows you to assign visibility to individuals, teams, superiors, divisions – you name it.

Geolocation: Some modern SFA systems offer geolocation functionality, which allows you to visualise your contacts, leads and deals on a map and reach them with one-touch driving directions. As a sales manager, you'll have greater insight into your market segmentation. How do you know if you need to hire an additional sales manager for the Southeast?

You can view the number of accounts by territory versus the number of sales managers to decide how best to service your customers.

Cost to grow: Just because an SFA system works for your company today, doesn't mean that it will be a fit in one or five years' time. Think about how an SFA system will scale as your business grows. Can the tool serve companies of any size? As you make your final decision, look for an SFA system that will be a long-term partner.

Score card

Score potential SFA vendors on how well they will scale with you.

Vendor	Scalability score (0-4)
1.	
2.	
3.	
4.	

10

Is it easy to customise to your business?

Your business is unique. Make sure that the SFA you choose can adapt. The sales cycle of an estate agent is different from the sales cycle of an advertising agency, for example. Look for an SFA system that allows you to customise your sales stages and add custom fields, filters and tags so that it makes sense for your business.

Sales stages

Look for an SFA solution that also offers fully customisable lead tracking and sales stages. Using the estate agent vs advertising agency example from above, if you were the New Business Development Director at Advertising Agency XYZ, you wouldn't choose an SFA system specific to estate agency work because you would want to map your sales cycle in a way that makes sense to your business.

Filter and sort

You often need to pull batches of customers using variables other than company or name. Filtering is the feature that you employ to define search criteria and conduct your SFA search. Filters are the data points that your SFA uses to get you the information you need. Sorting determines the order in which search results are presented.



Score card

Score potential SFA vendors on how easily the system can be customised to your business.

Vendor	'Ability to customise' score (0-4)
1.	
2.	
3.	
4.	

11

Can you import and export your data easily?

If you're already using an SFA system and you'd like to change vendors, a big concern is how you are going to get your data out of one system and into another.

Because data is such an important business asset, this consideration cannot be overlooked. Here are some key considerations:

- Do you need your IT department to import and export data?
Or can users complete this process themselves?
- Can you run your current system and the system to which you're switching in parallel?
- How well does the company document the import/export process?

Score card

Score potential SFA vendors on how easy it is to work with your data.

Vendor	Data access score (0-4)
1.	
2.	
3.	
4.	

12

Can you import and export your data easily?

It's important to remember that when you're selecting an SFA system, you're not only selecting a product, you're selecting a partner. How would you rate your interactions with each company that you are evaluating? What are their customer service and support options like after you're up and running? Some companies may try to give you the hard sell, only to neglect you once you're actually a customer. Make sure that you're selecting the right partner, one who will show you the way to SFA success.

Score card

Score potential SFA vendors on the quality of their customer support.

Vendor	Customer support score (0-4)
1.	
2.	
3.	
4.	

Meet Zendesk Sell

We hope that you've found this free template useful. You're well on your way to finding the right SFA for you. In your search, don't forget to add Zendesk Sell to your shortlist.

Zendesk Sell, the future of SFA, is an intuitive, easy-to-use tool that only takes minutes to set up.

Inspired? To learn more, go to zendesk.co.uk/sell to sign up for a free trial.

